FCRB Training Guide
Using Google Drive for FCRB Files:
Confidentiality and Electronic Case File Management

Why is the Child Advocacy Board transitioning to electronic files for FCRB?
As time and resources become more stringent, it is imperative that our agency look for more cost- and time-efficient ways to prepare and share case file documents with local board members and facilitators. Resources are used for supplies (paper, file folders, labels, envelopes, file cabinets for storage, etc.), postage (stamps and shipping costs) and a significant amount of staff time is needed to prepare hard copy files for each board.

More importantly there are hundreds of confidential documents that are shuffled back and forth between offices and local members that are difficult to manage and ensure the confidentiality of to the best of everyone's abilities.

This method also has many benefits for our organization that include:

1. Enhanced security of confidential information by maintaining all documents in a shared folder that requires passwords to access;
2. Cost-savings for CAB (Reduced paper, toner, file folder expenses, postage and shipping costs and shredding costs);
3. Reduction in staff time spent on copying allowing us to redirect their time to other tasks to enhance the FCRB process; and
4. Reduction in file storage space.

Savings Example
Copying for 7 kids on one board
86 documents x 5 (board member) copies = 430 document copies
Copies required roughly 5 reams of paper (2500 sheets)
7 inches of paper that will be added to prior folders.

Ultimately, moving to a less paper system for FCRB case file management gives us increased security of confidential information, cost savings, sustainability of the current boards and potential to expand and review more children.

If a board member does not have internet access in their home or equipment, they need to consult their coordinator about other ways to access the electronic files.

Screenshots in this training guide do not contain confidential information as a fictitious case was used.

Board members will continue to receive a monthly packet that contains a copy of the agenda, LQ worksheets, Barriers to Permanency sheet for assigned LQ, folders for each child that contain the most current copy of the case permanency plan, social history (if available), previous FCRB report and most current court order. Board members will add their notes to their folders. The folders will be turned in at the end of the review day.

Getting Started

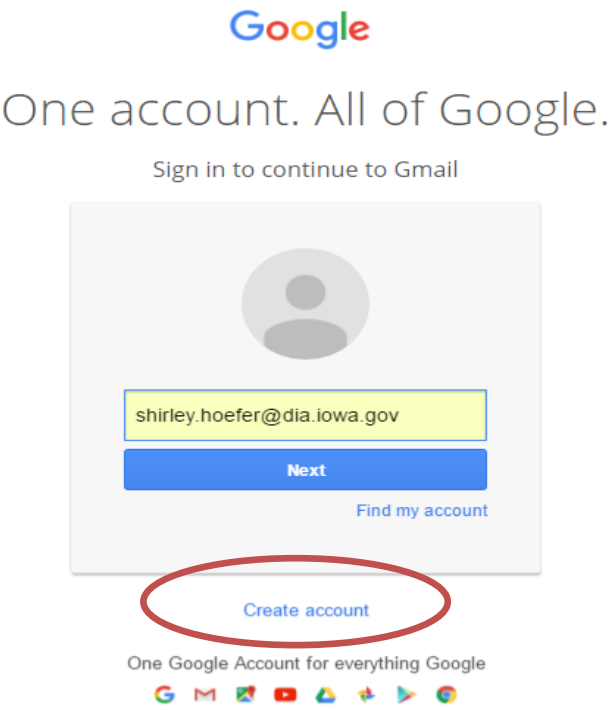
Everyone will need to set up a free Gmail account in order to access the confidential information shared for a review day.

If a board member already has a private Gmail account (no other family members or individuals use the account or have the password to the account), you do not need to create another Gmail account.

Steps:

1. In your web browser, type gmail.com

2. Follow the prompt to create an account



3. Make sure you keep track of your password. This is a password that is unique to you. Recall from *Security Awareness training* that a strong password contains: a

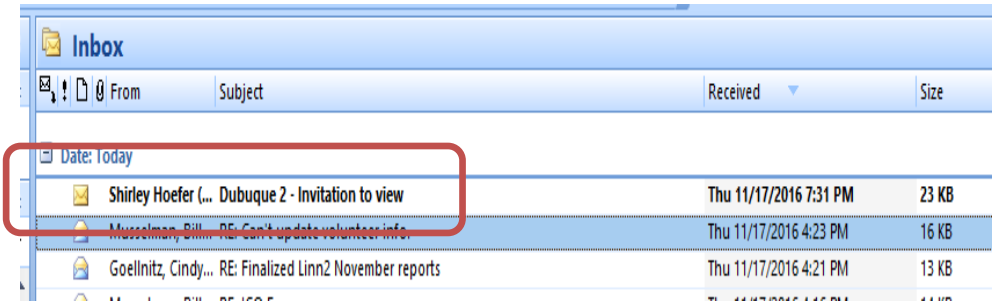
combination of lower and upper-case letters and at least one number or special character (@, #, !, etc.)

Email Alert

In order to gain access to the electronic folder for the review board, members will receive an email with the Subject: **Invitation to view.** The email can be sent to the member's primary email address. Board members do not need a Gmail account to receive the invitations.

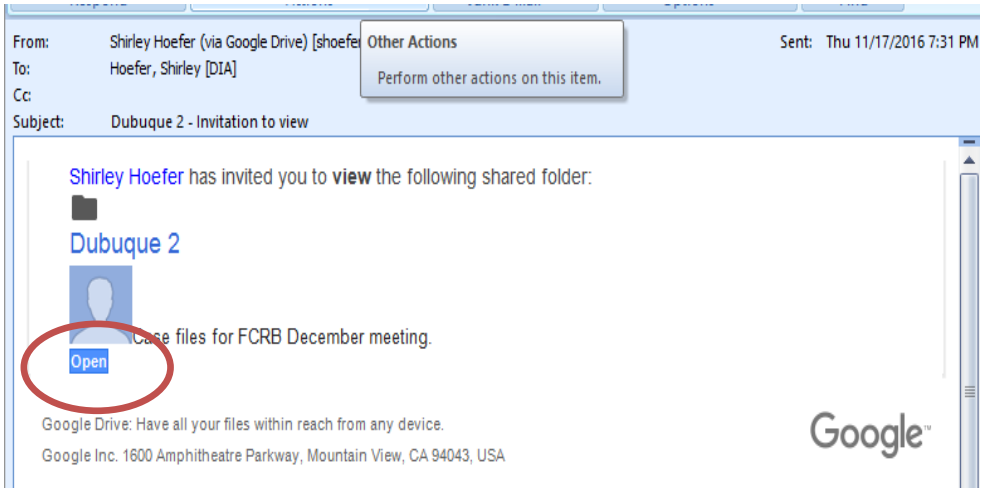
- If Gmail is not an email address that is checked on a regular basis, CAB staff do not need to have the Gmail address and will continue to send invitations to the board members' primary email addresses.

The email will be sent at least 21 days prior to the review day in order for board members to have time to read and prep the cases.

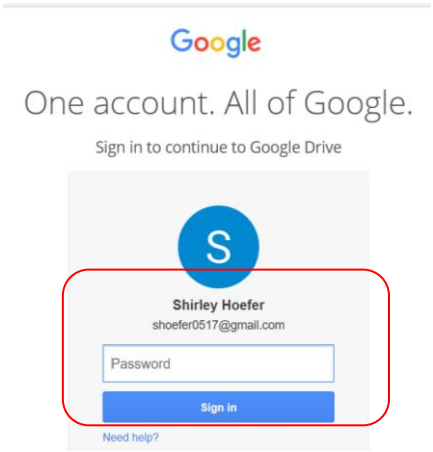


Gaining Access to View Confidential Case File Documents

1. Open the email and it will look like the image below
2. Click on Open



3. Log into your Google (Gmail) Account

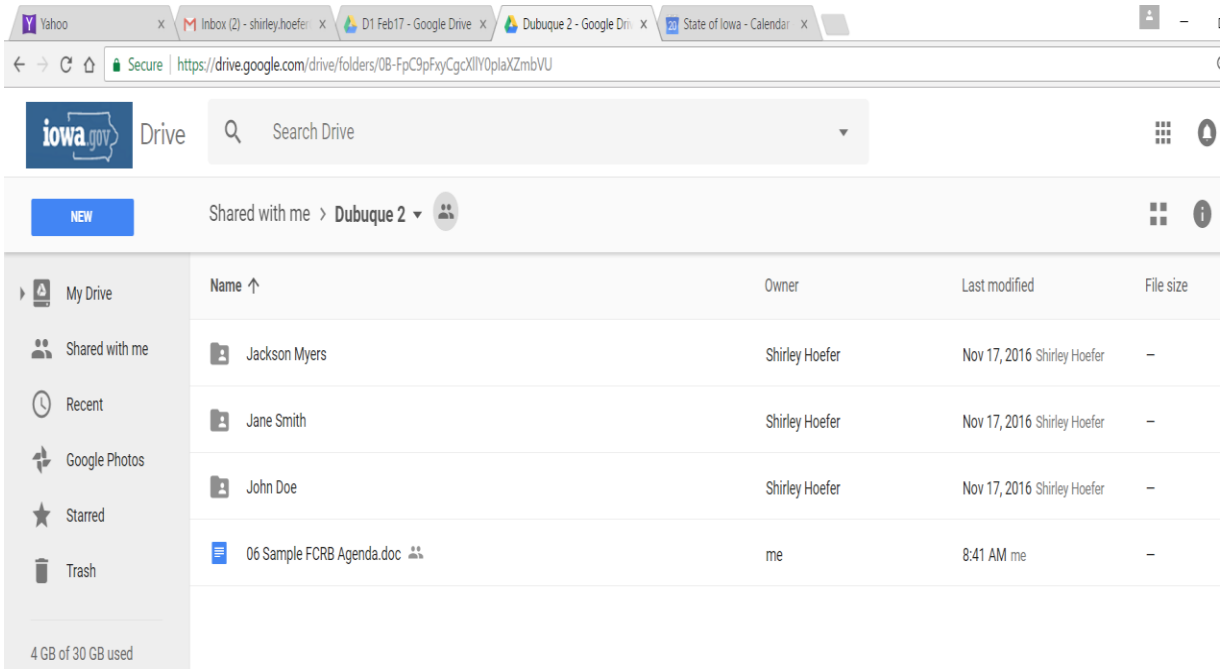


Forgot Password to Google (Gmail) Account
Remembering passwords for multiple accounts can be cumbersome. To recover a password, follow these steps:

1. https://accounts.google.com/signin/recovery
2. Enter the email address for the Google (Gmail) account
3. Click Next and follow the prompts

Viewing Documents
When you log into your Google (Gmail) account, it will take you directly to the shared folder the first time you open the link from the email you received.

Each **board folder** will contain:
1. Copy of the most current agenda
2. A folder for each child on the agenda

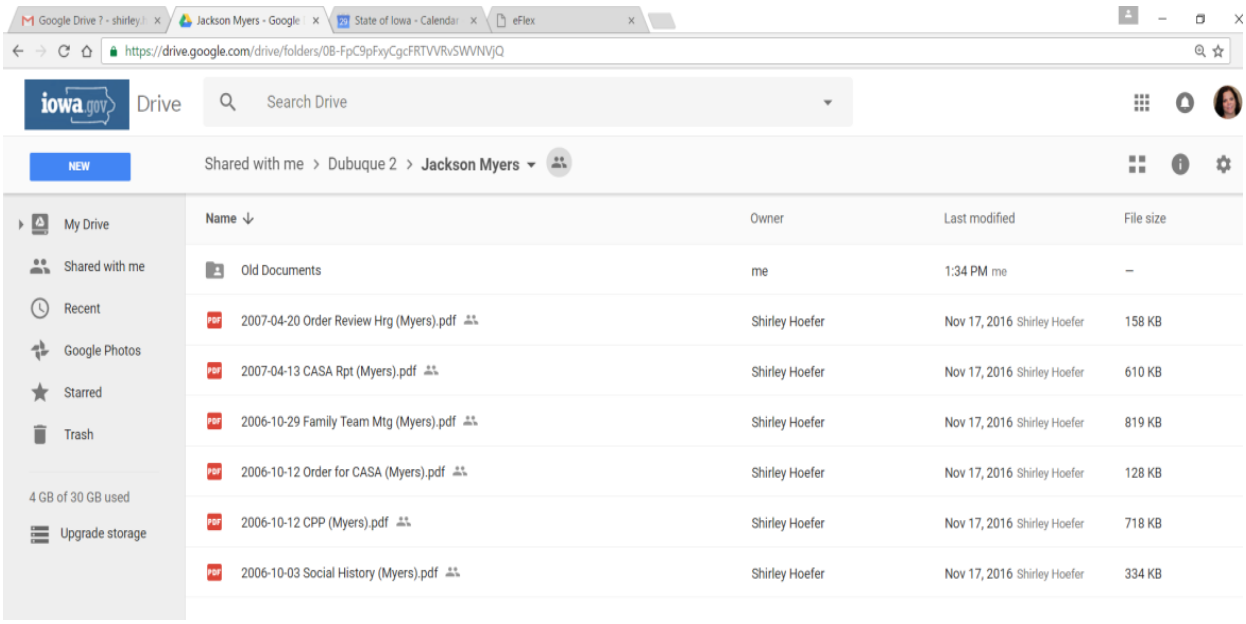


The agenda will be stored as a Google Doc so that facilitators and board members can open it within the folder. If an agenda is revised, the current agenda will be added to the board folder.

Each **child's folder** will contain:
1. A Late Mail folder (if applicable)
2. Case file documents.

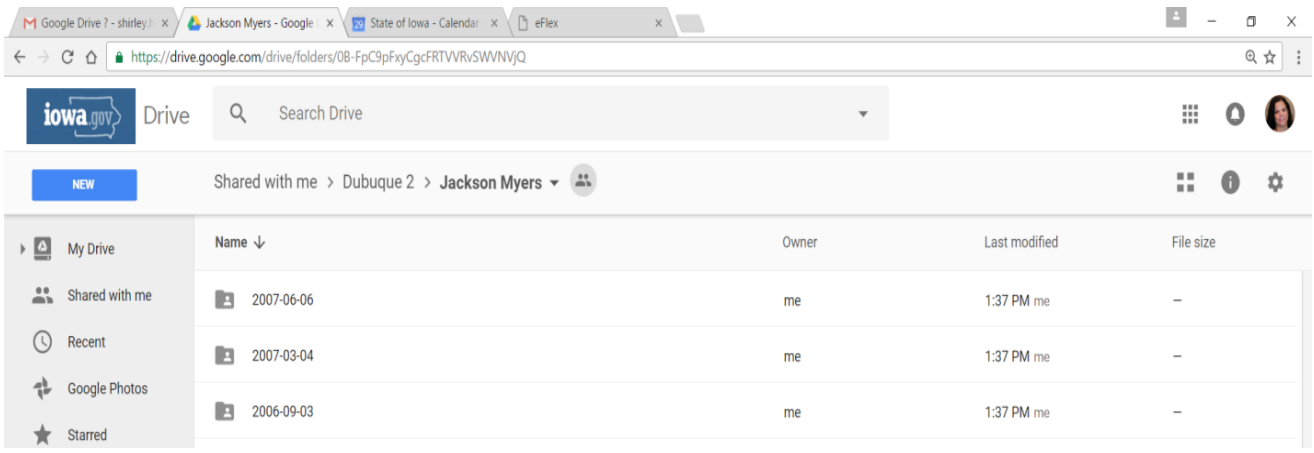
There are a variety of ways that the board folders can be set up. Each Administrative Assistant has a system in place to organize the children's documents. The following are the two most common systems for organizing the case file materials.

1. All documents received since the last review along with the last FCRB report are in the folder. All old documents are in a folder named Old Documents within the child's folder.



Old Document folder – this folder is included because it contains historical documents on the case. It may not be necessary to even open the folder as the current information since the last review is contained outside that Old Document folder. The information reviewers will need most is the current information.

2. There is a folder for each Review Date within the child's folder and every document received for that particular review is stored in the folder.



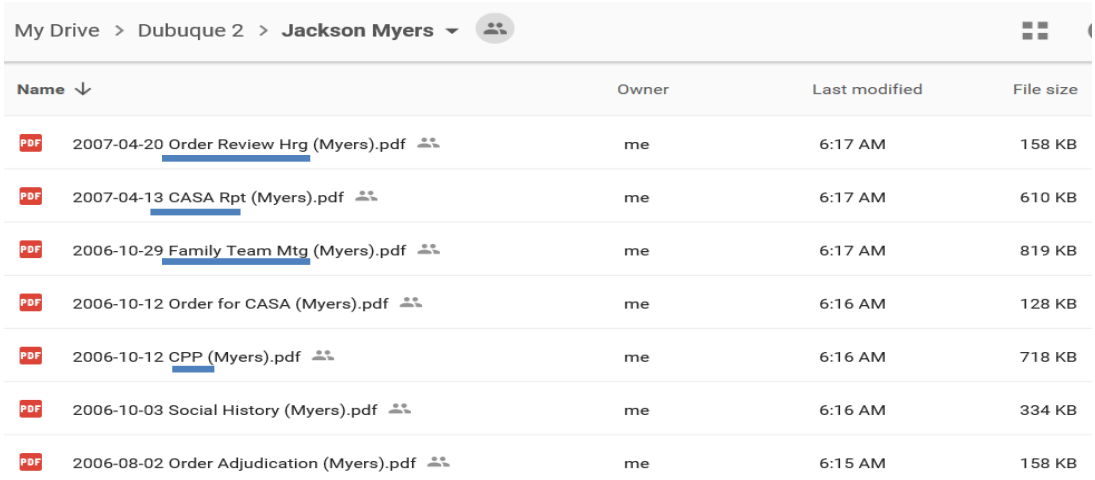
The Administrative Assistant will establish a consistent organizational system for the electronic folders in order for facilitators and board members to become more familiar with accessing the case file documents for each board day.

Navigating within the shared folder

1. Begin by opening a child's folder.

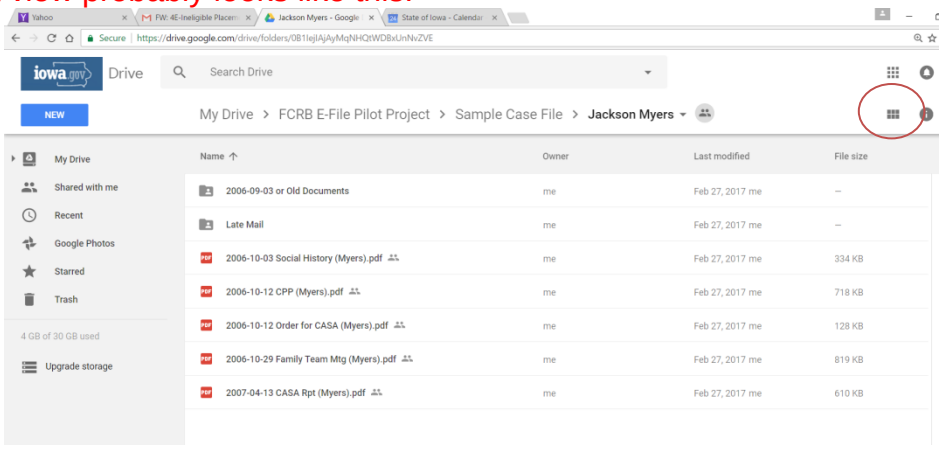
2. Documents are filed by date so that they are chronological within the folder. This allows for viewers to read the case in order as the events occurred.

3. Each document will have a descriptor in the document name that shows what the document is.



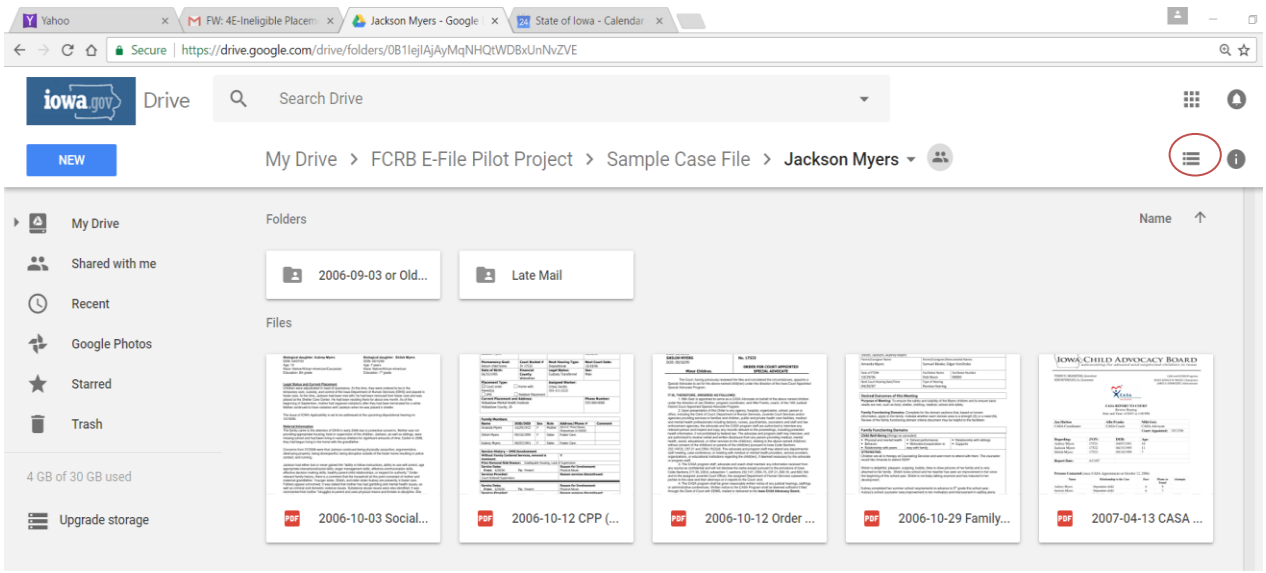
Tip: Change the view of the Google folder to thumbnail by following these steps. You will see the documents, still chronologically, but now you'll have a glimpse of the first page so it's easier to recognize a CPP from a court order or FSRP provider report.

Current view probably looks like this:



Change the list view to thumbnails by clicking on the icon circled in red above.

Now the view should look like the following:

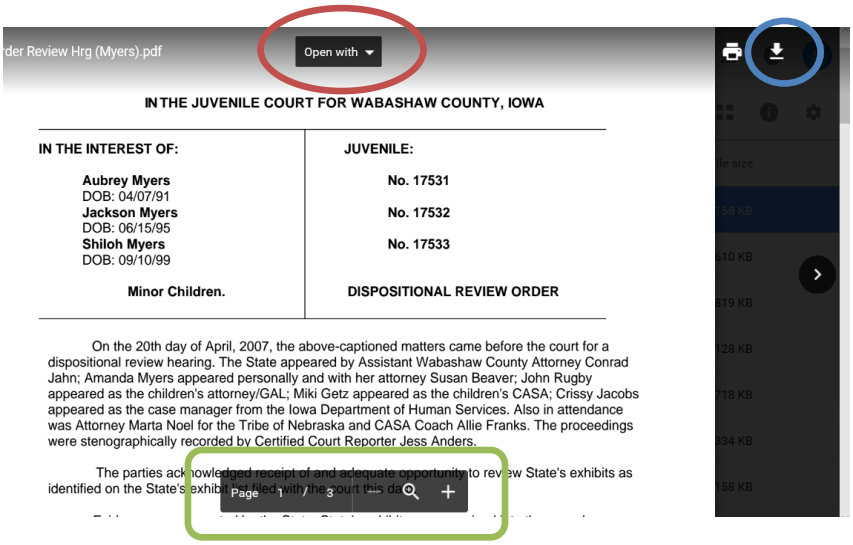


Each document within the folder is still chronological; however, now you see a part of the first page and can more easily identify the CPP from the court order from the CASA report etc…

If you ever want to change the view back to the list, click on the icon (circled in red above). We have not found a Google setting that maintains the grid view. If you change to grid view it should stay in grid view for all folders during the time you are in Google Drive. When you logout and log back in, you will likely have to change to grid view again.

Although board members will receive a hard copy of the CPP, Social History (where available), previous FCRB report and the most current court order for each child on the agenda, the electronic copies will also be stored in the Google Drive folder.

4. Click on a document to open it



Viewing options include:

a. **Preferred method:** Viewing the document as it opens in the Google view (screenshot above). Scroll up and down to read through the document.
b. Open with drop-down at the top (red circle)
c. Download (blue circle)

Because this is confidential information, it is not advisable to download documents and save them to a USB drive, computer, tablet, phone or other device. However, due to limited internet access and/or data plans, it may be necessary for some volunteers to download documents so they can read them offline.

Note: If it is necessary to download and save the documents, board members must adhere to the provisions outlined in the Security Awareness training for protecting confidential information. This is the annual training that Board Members receive in November/December. Most importantly, keep the flash drive in a secure location and delete the files after each review.

Increase/Decrease size of the document

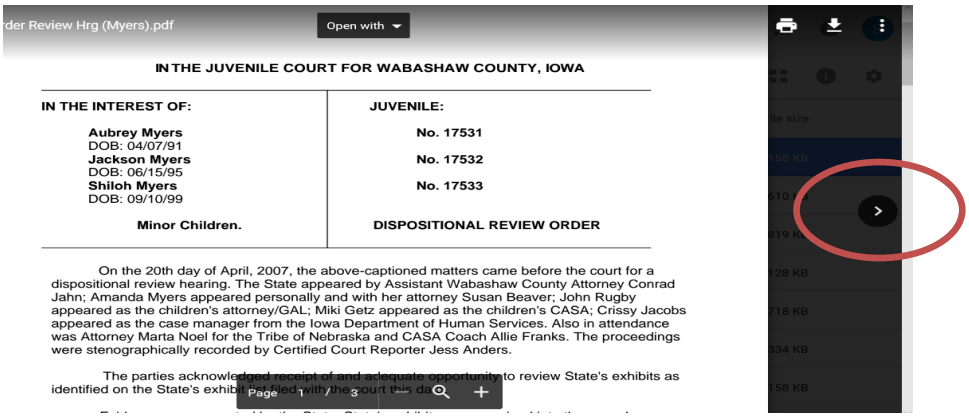
Google provides viewers with the ability to increase or decrease the size of the document in order to adjust the font size for the individual user.

a. At the bottom of the viewing screen you will see how many pages long the document is.
b. There is also a – and + sign where you can decrease or increase the view by clicking on the appropriate sign.

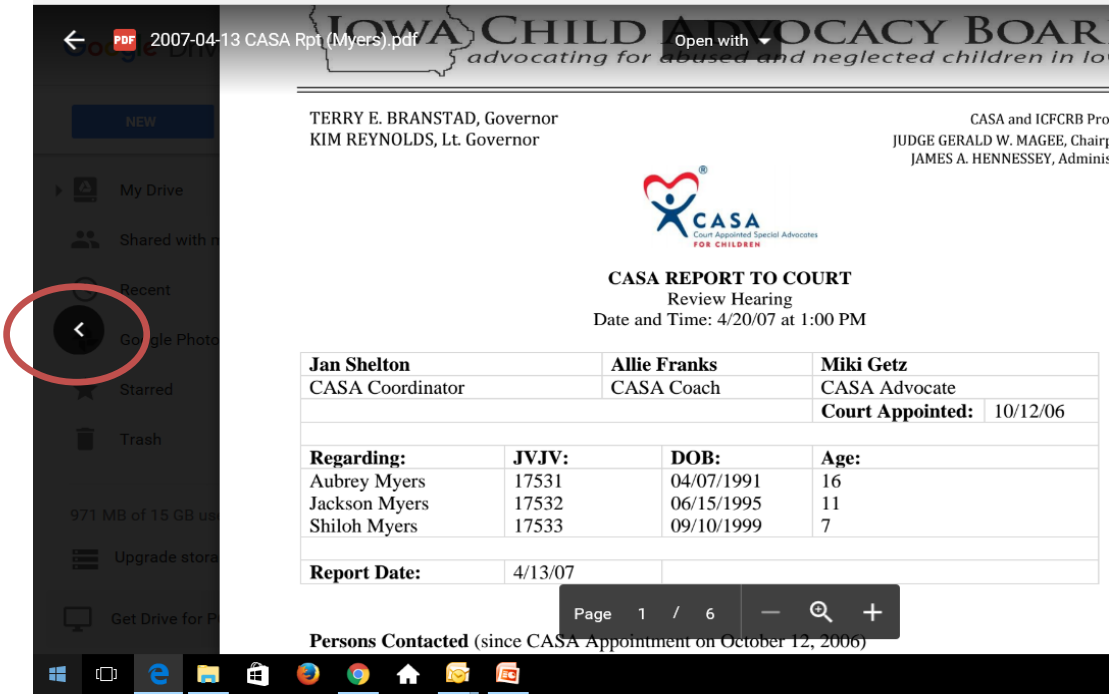
Advancing the documents in a child's folder

Google Drive provides the opportunity to advance through the documents within the folder without having to close out of the document and opening the next one. Viewers can move through the child's documents in chronological order.

1. To advance to the next document, click on the arrow to the right in the middle of the screen.



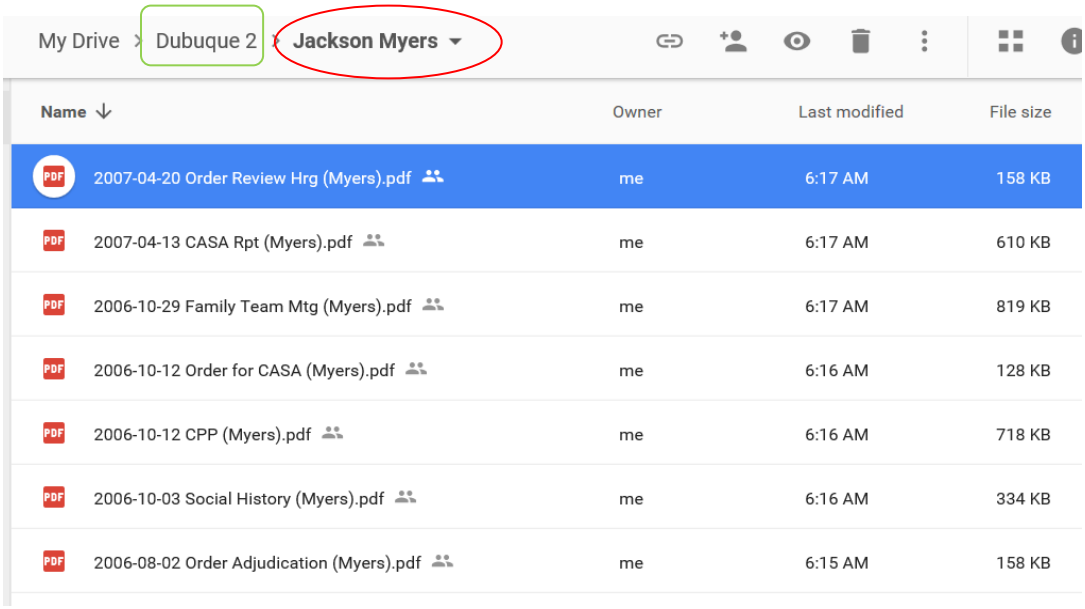
2. To return (or go back) to a previous document, click on the arrow in the middle of the screen to the left.



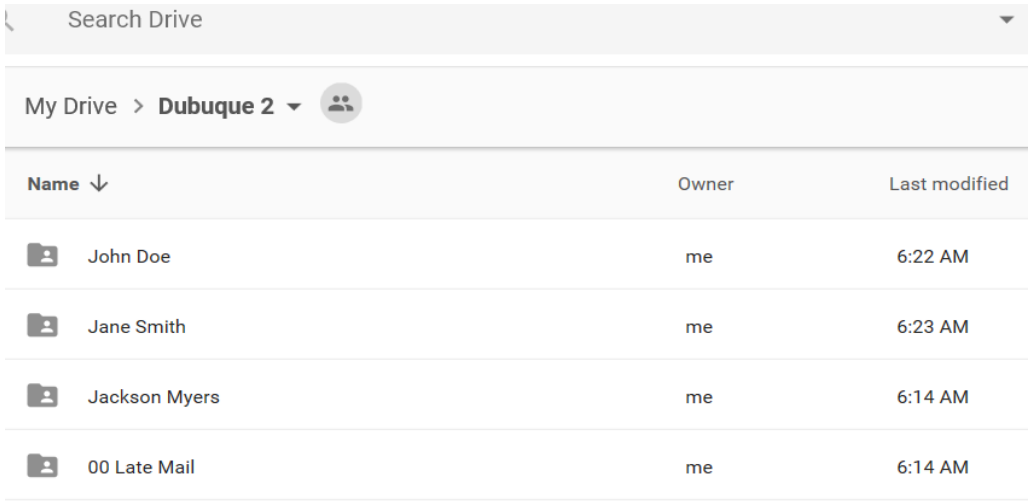
Returning to the child's folder

Once you've read through the documents and made your notes for a child's case, you can easily return to the child's folder or the board folder.

1. Return to the child's folder by clicking on the child's name on the top toolbar.
2. Return to the board folder by clicking on the board folder name on the top toolbar.



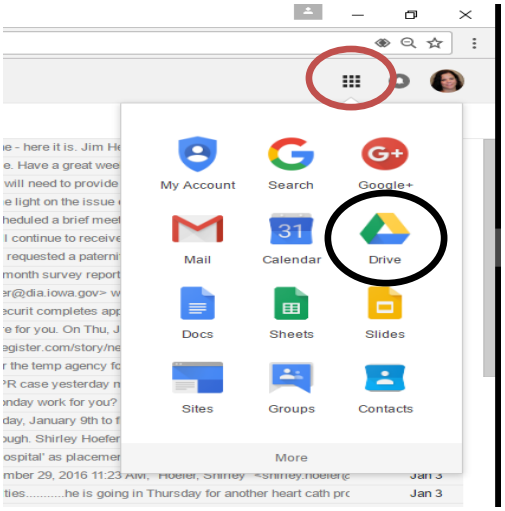
Clicking on the board folder name will take you back to the folder where you can access the case file for the next child.



Review Preparation

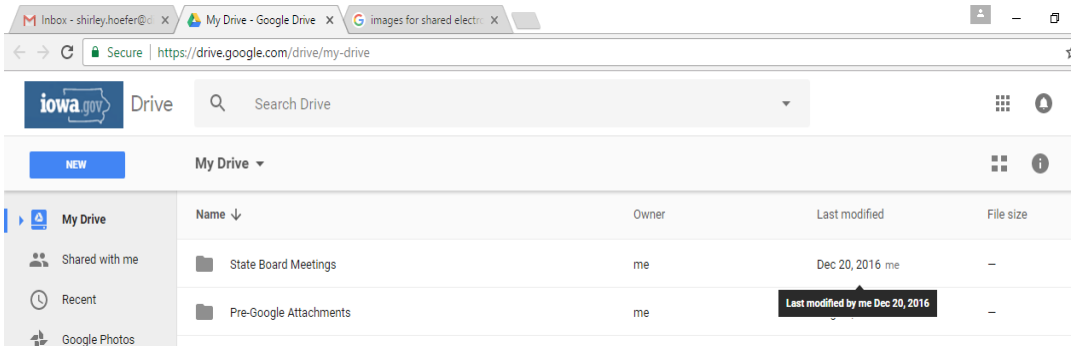
Once you open a shared folder, you will have ongoing access to the folder and will not need a link to access the information each time you want to read and prep for reviews. At any time leading up to the review day, you can access the shared folder by following these steps:

1. Login to Google (gmail.com)
2. You will be taken directly to your email
3. Click on the 9x9 grid in the upper right hand corner and a box opens like the image below.



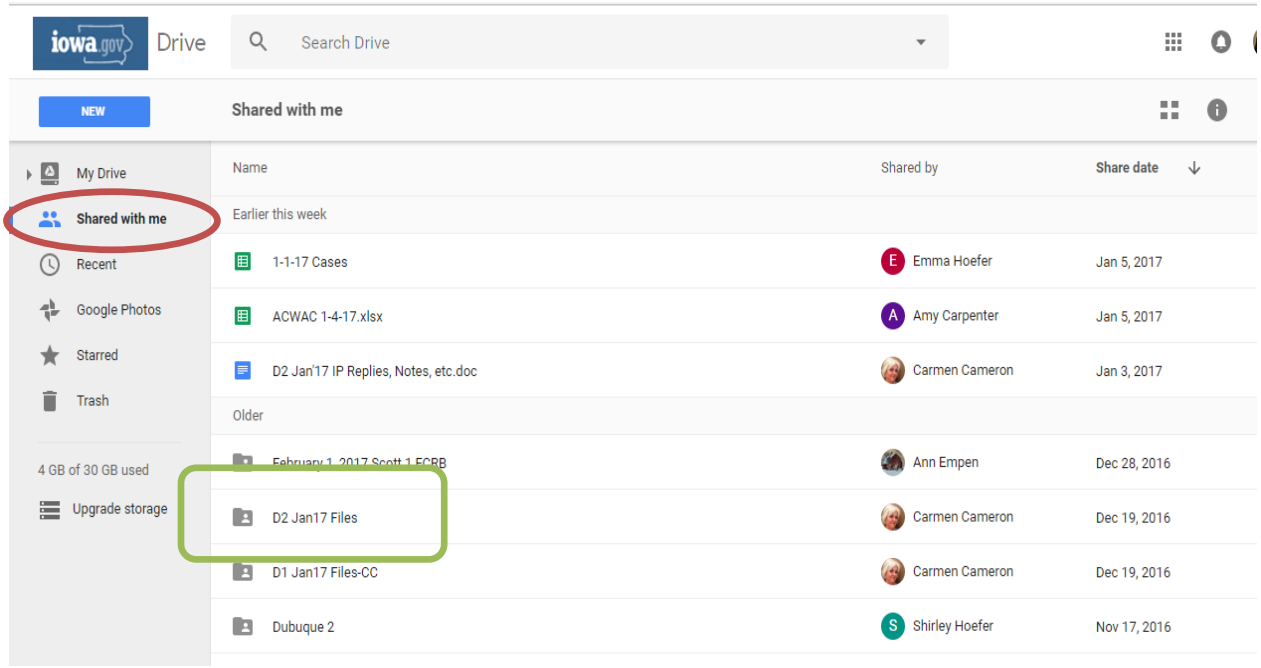
4. Click on Drive

5. The drive screen should look like the following although you may not have documents or folders in the My Drive.



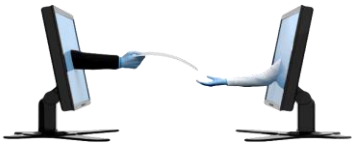
6. From the menu on the left, click on the Shared with me and the files or folders that have been shared will be accessible.

7. Locate the folder that was shared and open it to gain access to the case files for the upcoming review.



8. Once a review is over, you can delete the folder from your Shared with me. This will help maintain the storage space on your free account. Additionally, when those cases are reviewed again, their most current folder with all updated documents will be shared with you at the appropriate time. Administrative Assistants will not be keeping up those files on Google Drive.

Late Mail



1. Administrative Assistants will continue to add late mail documents to the late mail folders in the children's file folders leading up to the reviews.

2. Courtesy emails will be sent to let board members know that new documents have been added to the late mail folders. This typically occurs one week prior to the review. Instead of mailing late documents, the documents will be uploaded to the appropriate children's folders in the Late Mail folder.

3. Members do not need another invitation to view the folders. When board members prep for reviews, they will check to see if anything has been added to the Late Mail folders.

4. After reviews have been completed for the month, the AA will delete the folder and then add the next month's folder to Google Drive to begin the process over again. Each time a Board folder is added, the AA will have to invite you to the shared folder.

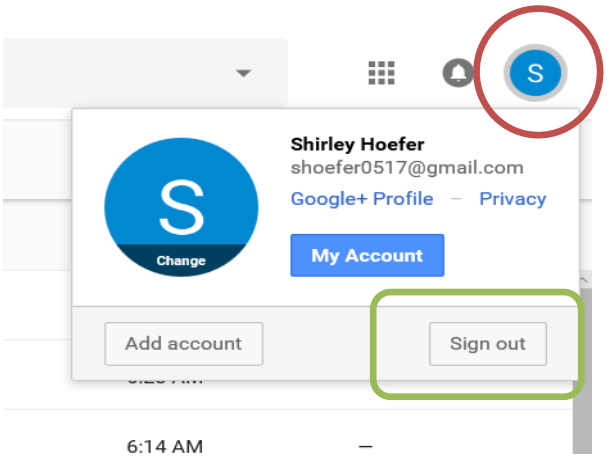
Logging Out of Google

It is important to always sign out of Google when you are finished with your work. This closes out the account for the time being and protects the confidentiality of the material stored on the Google Drive.

1. Upper right hand corner, click on the circle icon (it typically has your initial or a photo of you if you uploaded one).

2. The pop-up appears.

3. Click Sign out



OTHER TIPS FOR VOLUNTEERS:

Note-taking

It is critical that board members use the Lead Questioner worksheet to take notes when reviewing the case file for each child. This is a tangible document the lead questioner has in front of him/her during the review and should contain the notes gathered from the electronic and hard file documents in preparation for the review.

Lead Questioner Worksheets can be used by all Board Members and not only the assigned Lead Questioner. The current LQ Worksheet includes pertinent areas that address requirements of the *Preventing Sex Trafficking and Strengthening Families Act.*

Any notes that Board Members take shall be kept in their corresponding child's folder which will be returned at the end of the review day for storage at the local FCRB office. The notes will remain in the folder with the case file documents.

CAB Staff is working on developing an electronic version of the LQ Worksheet for those volunteers who may benefit from typing notes and/or copying and pasting information from documents over to the worksheet template. As this becomes available it will be shared with all volunteers.

What Board Members Can Expect:

1. 21-30 days in advance of the board meeting, board members will receive a minimal packet that contains:
    a. Agenda
    b. Folder for each child that only has a:
        i. CPP
        ii. Social History
        iii. Last FCRB report
        iv. Most current court order
    c. Lead Questioner worksheets
    d. Barriers to Permanency worksheets

2. At least 21 days in advance of the board meeting, board members will receive an email **Invitation to view** the rest of the case file materials for the upcoming review day.

3. Items to view electronically include:
    a. FSRP reports
    b. Court orders
    c. CASA reports
    d. Any other documents available for the child(ren)
    e. Current agenda for the day will be stored on Google Drive

4. Once the meeting is over, the board folder on Google Drive should be deleted. The next time those children are reviewed updated folders of information will be added to Google Drive and shared with the board members so everyone has access to the entire file.

Transitioning toward electronic case files is a change that through training and experience will become easier for staff, facilitators and board members. It will take time to adapt to this method and there will likely be some growing pains along the way. ICAB staff is committed to making this transition as smooth as possible for everyone involved.

If you need additional training or have questions, please contact your local coordinator who will make arrangements to meet your training needs.